

Saluda County Base Labor Market Analysis



South Carolina
Department of
Commerce
Labor Market Information

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TABLE OF CONTENTS

EXECUTIVE SUMMARY	5
POPULATION	6
Growth.....	6
LABORSHED.....	7
Characteristics of Workers	7
INCOME	9
Per Capita Income	9
Wages by Industry	10
Wages by Occupation.....	11
EDUCATION	12
High School Graduates.....	12
Higher Education Graduates.....	13
OCCUPATIONS.....	15
Occupational Projections.....	15
Occupational Education Requirements.....	16
INDUSTRY	17
Businesses by Sector.....	17
Growth in Number of Businesses	18
Employment by Sector	18
Industry Analysis	19
MOVING FORWARD.....	20
Appendix A: Occupational Projections	
Appendix B: Businesses by 3-digit NAICS Codes	
Appendix C: Employment by Industry Sector	

EXECUTIVE SUMMARY

Population

Saluda County's population growth has been slower than the state's in recent years.

Future growth is expected to be slower than the state's.

Less than half of Saluda County's workers live within the county.

A significant number come in from Lexington County.

Income

Per capita income growth has been faster than in the state and nation.

As a result, Saluda County's per capita income has moved closer to the state and national levels from 1996 to 2006.

Saluda County's average wages are higher than the state's in the food preparation and serving related occupation group.

Education

The number of degrees awarded by area post-secondary institutions has increased.

The greatest increase has been in the area of healthcare.

Occupations

The following occupational groups are expected to have faster growth in Saluda County than in the state:

Computer and mathematical science; architecture and engineering; arts, design, entertainment, sports and media; and production.

Requirements for Saluda County's workers are expected to grow in the following levels of education and experience:

Work experience in a related field, bachelor's degree, and degree plus work experience.

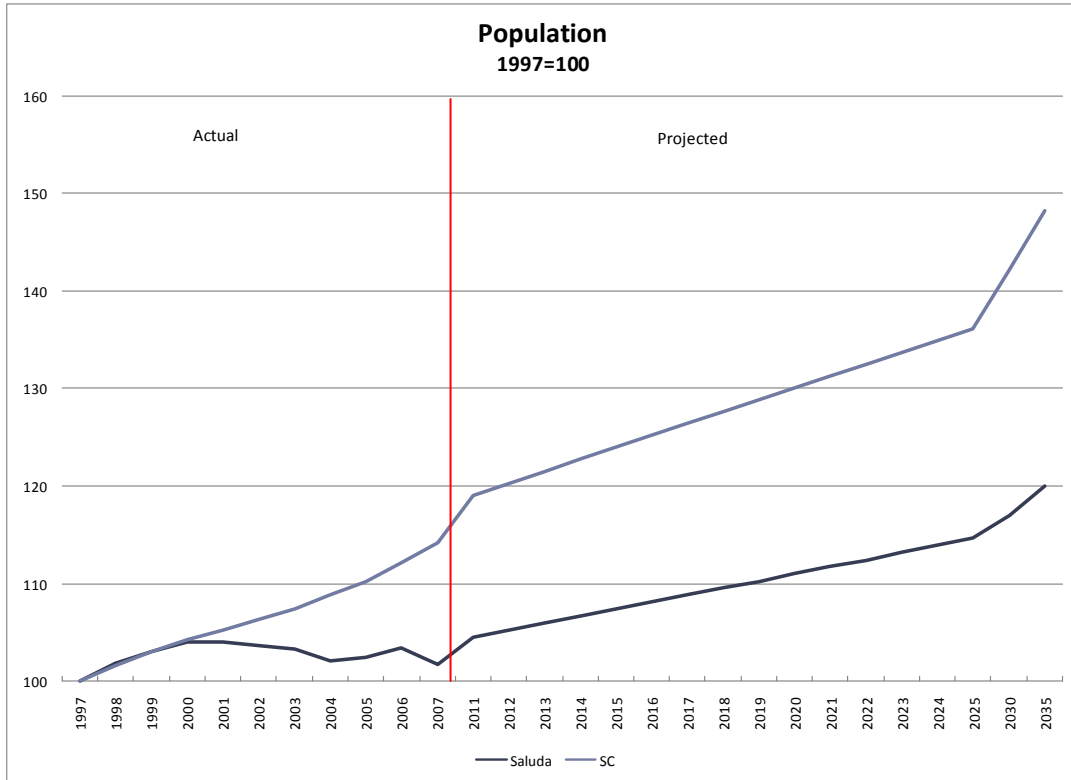
Industry

Food manufacturing and professional, scientific and technical services are sectors rated as having potential in Saluda County.

POPULATION

Growth

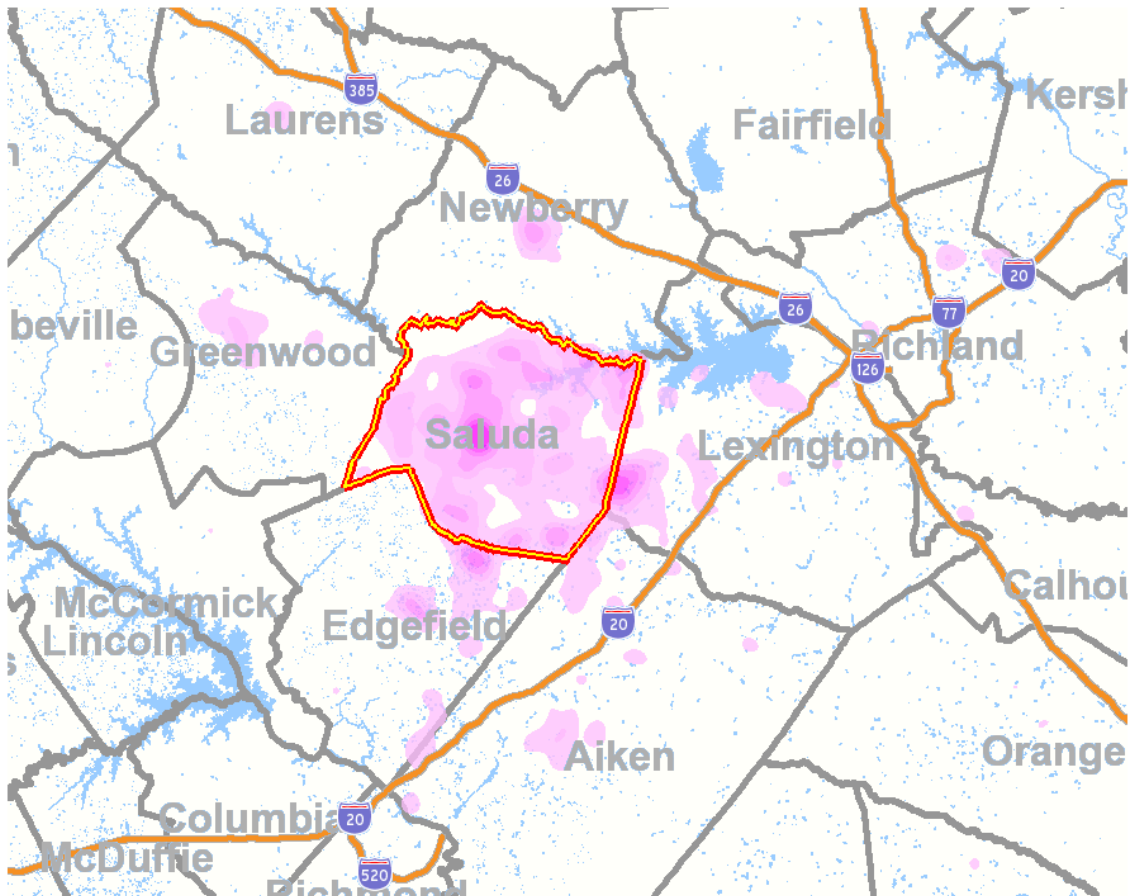
Saluda County's 2007 population was 18,748. The county population has grown by 1.7% since 1997, compared to 14.2% growth for South Carolina. Saluda's future population growth is expected to be slower than the state's.



Source: U.S. Census Bureau (estimates) and SC Budget & Control Board/Office of Research and Statistics (projections).

LABORSHED

The map below shows where Saluda County workers come from (in 2006, latest available data). Less than half of Saluda County workers live within its borders. A significant number come in from Lexington County.



Source: U.S. Census Bureau, Local Employment Dynamics.

Characteristics of Workers

Age of Workers:

30 or younger	30.3%
31 to 54	48.8%
55 or older	20.9%

Earnings of Workers:

\$1,200 per month or less	27.9%
\$1,201 to \$3,400 per month	59.6%
More than \$3,400 per month	12.5%

States Where Workers Live:

South Carolina	94.9%
Georgia	1.6%
All other locations	3.5%

Counties Where Workers Live:

Saluda	48.1%
Lexington	12.4%
Edgefield	8.6%
Aiken	7.1%
Greenwood	3.9%
Newberry	3.5%
Richland	2.5%
Orangeburg	1.0%
Spartanburg	0.7%
Laurens	0.7%
All Other Locations	11.6%

Cities Where Workers Live:

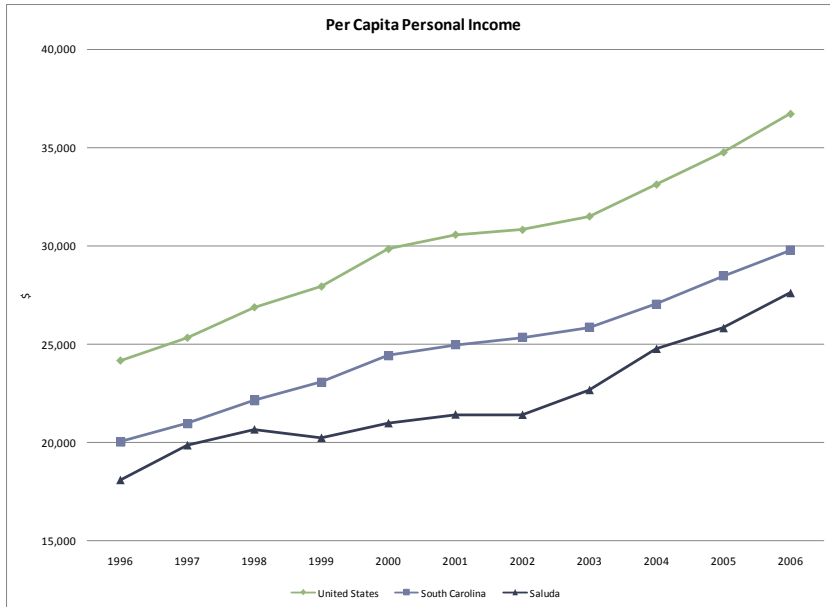
Saluda, South Carolina	8.9%
Batesburg-Leesville, South Carolina	5.8%
Johnston, South Carolina	2.3%
Newberry, South Carolina	1.4%
Edgefield, South Carolina	1.3%
Greenwood, South Carolina	1.2%
Ridge Spring, South Carolina	1.1%
Aiken, South Carolina	1.0%
Laurens, South Carolina	0.5%
North Augusta, South Carolina	0.4%
All Other Locations	76.1%

Source: U.S. Census Bureau, Local Employment Dynamics.

INCOME

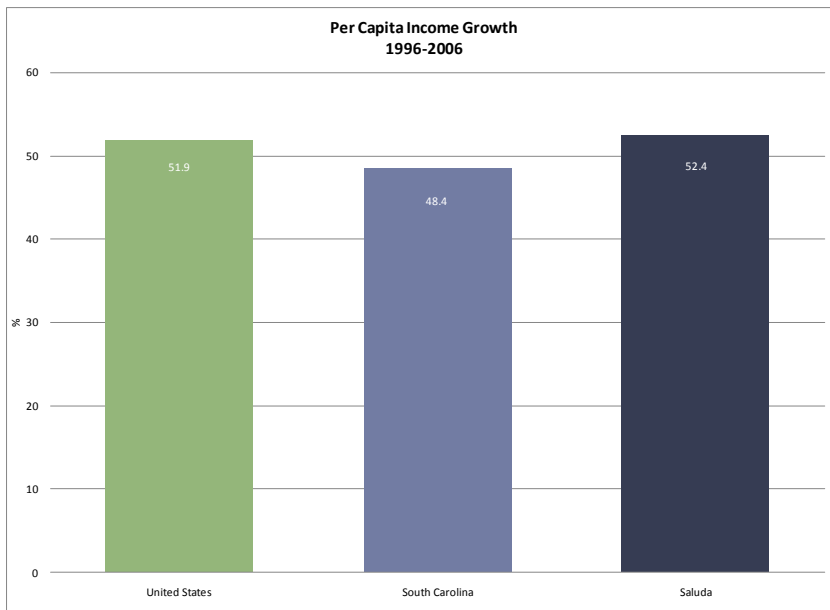
Per Capita Income

Saluda County's per capita income has moved closer to state and national levels.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Saluda County's per capita income has grown faster than South Carolina's and the nation's. However, this is due to slower population growth.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Wages by Industry

Saluda County's average wages are well below those of South Carolina (\$511 vs. \$680 in 2007). Average wages were up 22% in Saluda County over the past five years, compared to 18% for the state. All major sectors for which there was wage information had growth.

Industry	NAICS Code	2007 Average Weekly Wage (\$)	2002 Average Weekly Wage (\$)	% Change
Total, Private and Government		511	419	22
Construction	23	520	389	34
Manufacturing	31-33	497	424	17
Retail Trade	44-45	378	318	19
Transportation and Warehousing	48-49	691	523	32
Information	51	NA	NA	
Finance and Insurance	52	539	463	16
Real Estate and Rental and Leasing	53	267	182	47
Administration & Support & Waste Management & Remediation Services	56	526	447	18
Arts, Entertainment, and Recreation	71	NA	NA	
Accommodation and Food Services	72	NA	NA	
Other Services (Except Public Administration)	81	321	292	10
Federal Government		859	700	23
State Government		570	532	7
Local Government		565	477	18

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

Wages by Occupation

Average wages in Saluda County are higher than the state average in the food preparation and serving related occupational group.

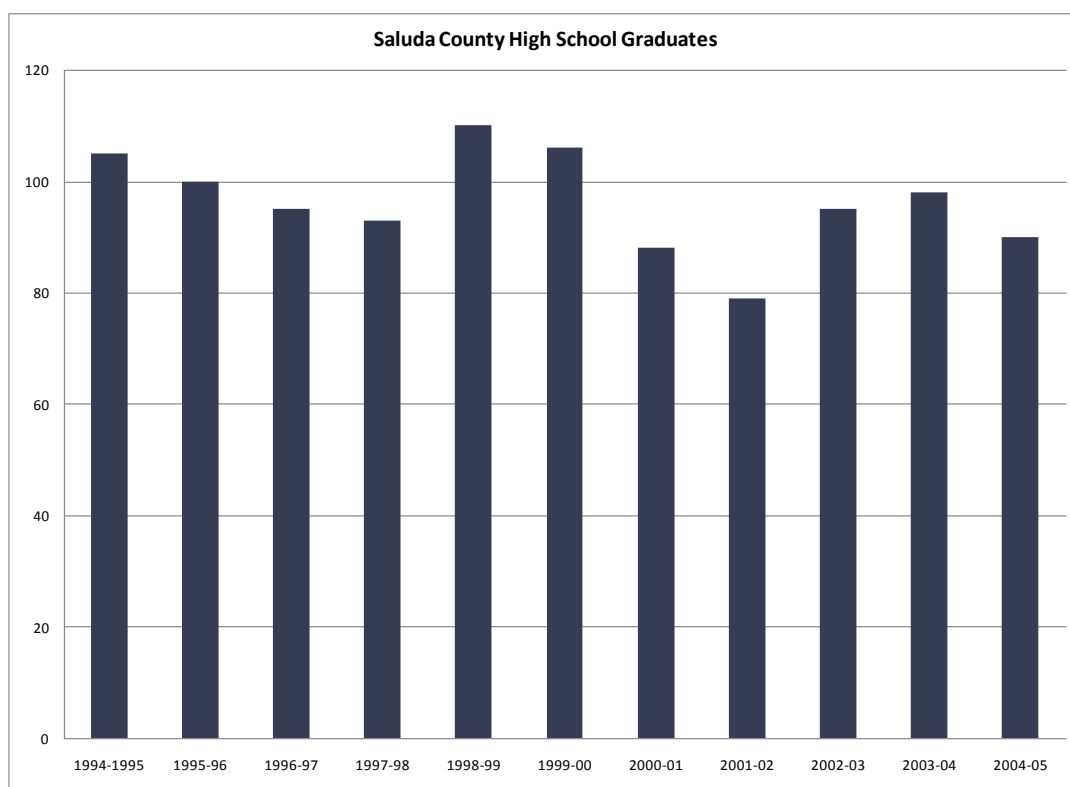
Occupation	2007 Saluda County Median Hourly Wage (\$)	2007 SC Median Hourly Wage (\$)
Management occupations	10.69	28.78
Business and financial operations occupations	13.98	20.28
Computer and mathematical science occupations	18.59	26.20
Architecture and engineering occupations	17.51	30.22
Life, physical and social science occupations	14.14	22.76
Community and social services occupations	11.16	13.18
Legal occupations	16.52	30.68
Education, training and library occupations	20.10	24.42
Arts, design, entertainment, sports and media occupations	8.61	12.66
Healthcare practitioners and technical occupations	20.14	30.64
Healthcare support occupations	7.85	10.55
Protective service occupations	13.21	13.87
Food preparation and serving related occupations	8.50	7.90
Building and grounds cleaning and maintenance occupations	8.03	8.42
Personal care and service occupations	7.09	8.39
Sales and related occupations	8.98	13.48
Office and administrative support occupations	9.40	13.22
Farming, fishing, and forestry occupations	7.82	13.07
Construction and extraction occupations	10.16	16.51
Installation, maintenance and repair occupations	11.95	16.88
Production occupations	9.74	15.21
Transportation and material moving occupations	8.88	12.94

Source: Economic Modeling Specialists, Inc.

EDUCATION

High School Graduates

From 1995 to 2005 (latest data available), the number of Saluda County students receiving high school diplomas fell by 15 (14%). In South Carolina, on the other hand, the number of high school diplomas increased 9% from 1995 to 2005. A total of 90 people received high school diplomas in Saluda County in 2005. Saluda County had 30 fewer 12th grade students in 2004-05 than in 1994-95. Also, the number of Saluda County students not passing the exit exam who received a certificate of completion instead of a diploma was up by 4 (to 14) over the 1995-2005 period.



Source: National Center for Education Statistics.

Higher Education Graduates

Over 6,200 more students graduated from higher educational institutions in the Upper Savannah area in 2006 than in 1996, an increase of 34%. The greatest numerical increase was in the healthcare field.

Program	1996	2006	Change	% Change
Agriculture, agriculture operations, and related sciences	27	68	41	152
Area, ethnic, cultural, and gender studies	23	31	8	35
Biological and biomedical sciences	625	601	-24	-4
Business, management, marketing, and related support services	3,136	3,976	840	27
Communication, journalism, and related programs	337	624	287	85
Communications technologies/technicians and support services	10	25	15	150
Computer and information sciences and support services	335	979	644	192
Construction trades	117	125	8	7
Education	2,016	2,363	347	17
Engineering technologies/technicians	297	318	21	7
Engineering	302	323	21	7
English language and literature/letters	408	427	19	5
Family and consumer sciences/human sciences	235	278	43	18
Foreign languages, literatures, and linguistics	149	162	13	9
Health professions and related clinical sciences	3,189	5,194	2,005	63
Legal professions and studies	396	448	52	13
Liberal arts and sciences, general studies and humanities	1,205	1,208	3	0
Library science	185	200	15	8
Mathematics and statistics	120	160	40	33
Mechanic and repair technologies/technicians	730	1,058	328	45
Multi/interdisciplinary studies	155	271	116	75
Natural resources and conservation	--	10		
Parks, recreation, leisure, and fitness studies	155	360	205	132
Personal and culinary services	47	180	133	283
Philosophy and religious studies	66	179	113	171
Physical sciences	242	214	-28	-12
Precision production	357	291	-66	-18
Psychology	539	712	173	32
Public administration and social service professions	347	488	141	41
Science technologies/technicians	6	13	7	117
Security and protective services	514	550	36	7
Social sciences and history	1,037	1,343	306	30
Theology and religious vocations	486	574	88	18
Transportation and materials moving	90	129	39	43
Visual and performing arts	372	592	220	59
TOTAL	18,255	24,474	6,219	34

Source: National Center for Education Statistics (Integrated Post Secondary Education System).

Data for these schools: Aiken Technical College, Allen University, Anderson University, Augusta Area Dietetic Internship-University Hospital (Georgia), Augusta State University (Georgia), Augusta Technical College (Georgia), Benedict College, Beta Tech, Bob Jones University, Claflin University, Columbia College, Columbia International University, Converse College, Erskine College and Seminary, Forrest Junior College, Furman University, Georgia Military College-Augusta Campus (Georgia), Greenville Technical College, ITT Technical Institute-Greenville, Lander University, Lutheran Theological Southern Seminary, Medical College of Georgia, Midlands Technical College, Newberry College, North Greenville University, Paine College (Augusta), Piedmont Technical College, Presbyterian College, Savannah River College (Georgia), South University, Spartanburg Community College, Spartanburg Methodist College, Tri-County Technical College, University of Phoenix-Columbia Campus, University of South Carolina-Aiken, University of South Carolina-Columbia, University of South Carolina-Upstate, W L Bonner College, and Wofford College.

OCCUPATIONS

Occupational Projections

The following occupational groups are projected to grow faster in Saluda County than in the state:

- Computer and mathematical science
- Architecture and engineering
- Arts, design, entertainment, sports and media
- Production

See **Appendix A** for detailed occupational information.

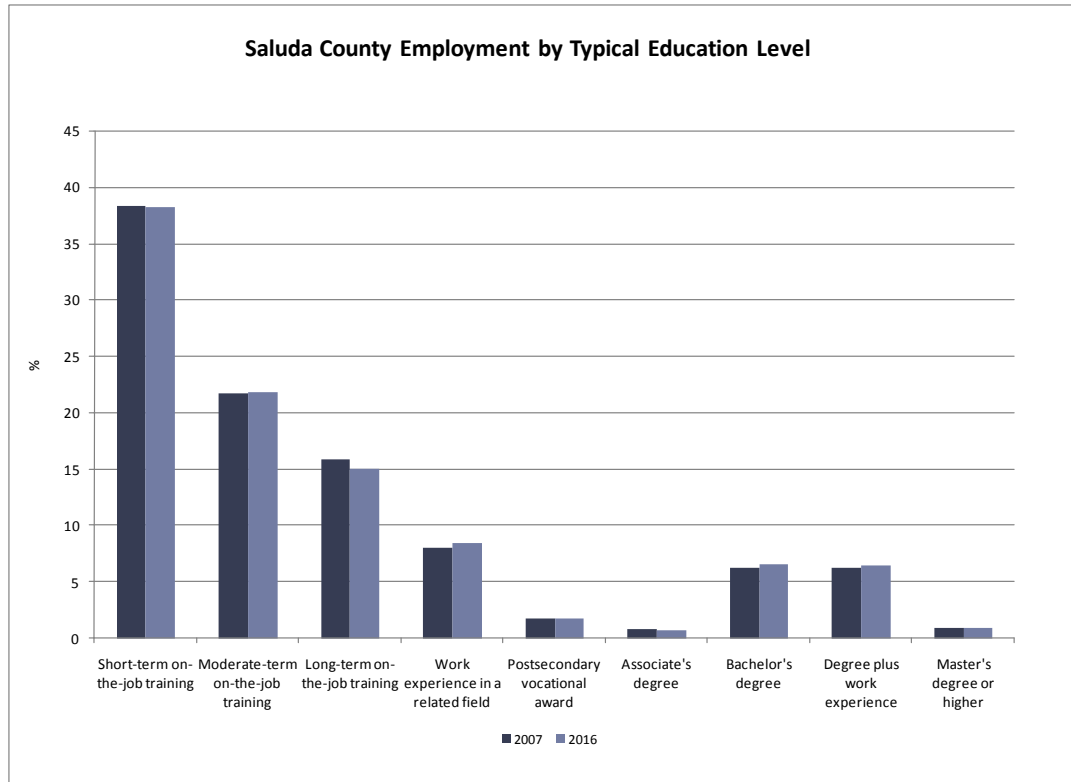
Occupation	2007-2016 Saluda County Projected Growth (%)	2007-2016 SC Projected Growth (%)
Management occupations	7	17
Business and financial operations occupations	20	22
Computer and mathematical science occupations	28	23
Architecture and engineering occupations	19	15
Life, physical and social science occupations	14	15
Community and social services occupations	8	15
Legal occupations	12	21
Education, training and library occupations	13	16
Arts, design, entertainment, sports and media occupations	23	17
Healthcare practitioners and technical occupations	7	24
Healthcare support occupations	7	25
Protective service occupations	13	18
Food preparation and serving related occupations	-8	13
Building and grounds cleaning and maintenance occupations	15	23
Personal care and service occupations	6	7
Sales and related occupations	14	19
Office and administrative support occupations	7	13
Farming, fishing and forestry occupations	10	16
Construction and extraction occupations	16	19
Installation, maintenance and repair occupations	17	17
Production occupations	17	10
Transportation and material moving occupations	5	11

Source: Economic Modeling Specialists, Inc.

Occupational Education Requirements

The trend for occupational growth shows that there will be growth in jobs across skill levels. Based on employment projections, Saluda County is expected to see growth in requirements for the following specific levels of education and experience:

- Work experience in a related field
- Bachelor's degree
- Degree plus work experience



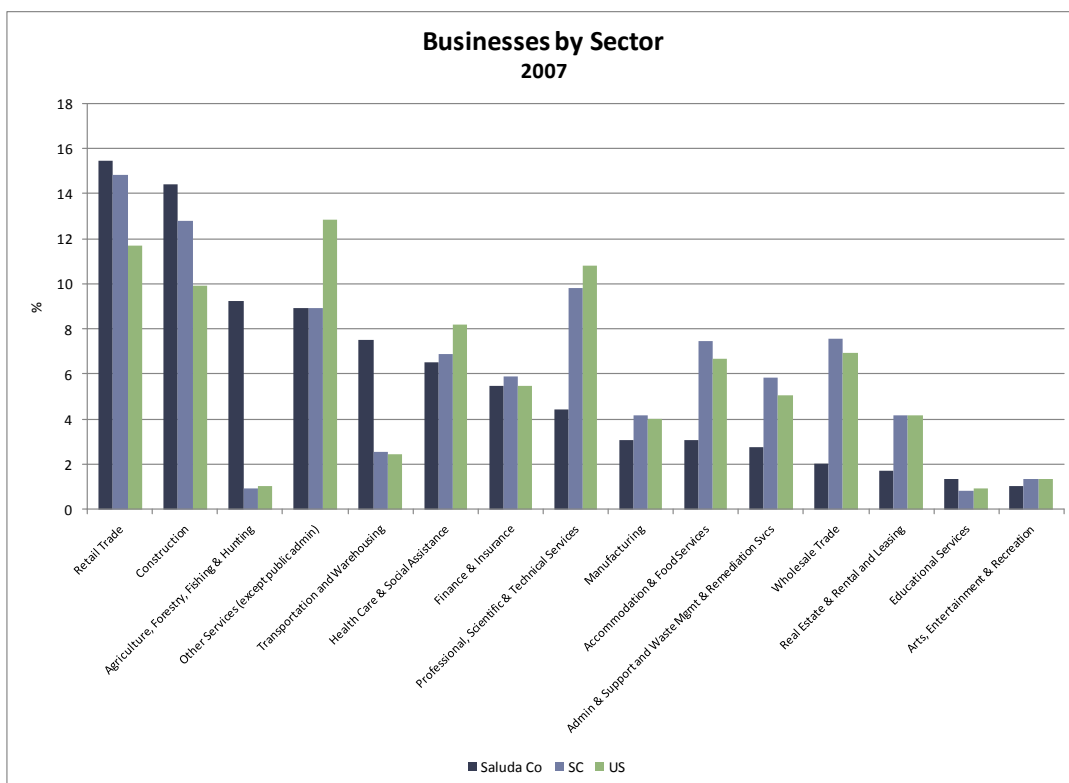
Source: Economic Modeling Specialists, Inc

INDUSTRY

Businesses by Sector

Saluda County had higher percentages of businesses than South Carolina or the nation in the following sectors:

- Retail trade
- Construction
- Agriculture and forestry
- Transportation and warehousing
- Educational services



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Growth in Number of Businesses

The number of private businesses in Saluda County fell by 14% from 2002 to 2007, compared to a 2% drop for the state. For industry definitions, this analysis uses the North American Industry Classification System (NAICS), the U.S. standard for industry classification.

At the three-digit NAICS code level, based on available data, Saluda County had higher growth in five industries compared to South Carolina and the U.S. Below is a list of those five industries along with their respective growth rates.

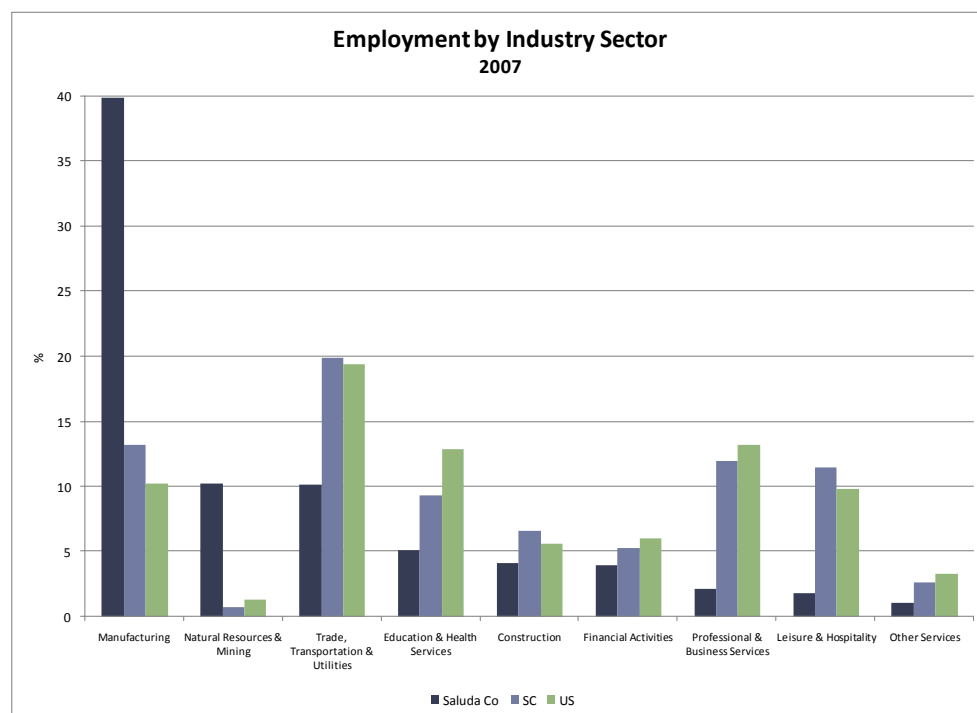
See **Appendix B** for information on all industries.

Industry	2002-2007 Growth (%)		
	Saluda Co.	SC	US
Support activities for agriculture and forestry	14.3	-13.0	1.8
Gasoline stations	42.9	-2.8	-1.9
Professional, scientific and technical services	18.2	2.1	14.3
Ambulatory health care services	30.0	7.4	13.3
Private households	28.6	4.6	24.9

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Employment by Sector

Saluda County has a larger than average share of its jobs in manufacturing and natural resources and mining.



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Industry Analysis

Screening Criteria

Industry sectors were rated on six factors:

- | | |
|------------------------------------|---------------------------------|
| • 2002-2007 employment growth | Competitive effect ¹ |
| • 2002-2007 employment growth rate | Average annual wage |
| • Location quotient ² | Projected growth |

Using those factors, sectors were awarded “stars” based on meeting the following criteria:

- 2002-2007 employment growth of 25 or more (Did the sector add a significant number of jobs?)
- 2002-2007 employment growth rate greater than 0% (the county lost jobs over the period) (Did the sector add jobs?)
- Location quotient of at least 1.25 (Does the sector have a significant concentration in the county?)
- Competitive effect greater than 0 (Did the sector add jobs beyond national growth overall and in the sector?)
- Average annual wage greater than \$26,591 (2007 average for the county) (Does the sector pay wages greater than average for the county?)
- Average or above average projected growth (Is the sector expected to add jobs?)

Data Limitations

Because of Census and Bureau of Labor Statistics restrictions, information on detailed industry sectors is quite limited for smaller counties such as Saluda. Therefore, this base analysis is not as comprehensive as those for larger areas. Further analysis can be conducted on growth occupations and using other resources in an attempt to obtain more detailed information on potential focus industries for Saluda County. The Department of Commerce can assist in this supplemental analysis.

Industries of Note

Based on these criteria and available data, there are no “six star” sectors in Saluda County. There are two “five star” sectors:

- Food manufacturing (with only below-average wages)
- Professional, scientific and technical services (location quotient below 1.25).

Industry sectors that generate wealth from outside the area are referred to as the region’s base economy. Base economy sectors are important to an area’s economic well-being. Both of the sectors above fit this base economy criteria.

Appendix C has information on all factors for all sectors for Saluda County.

¹ *Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in the county after accounting for overall US employment growth and growth/decline in the sector in the US.*

² *Location Quotient: percentage of employment in the sector in the county divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in the county compared to the US; based on 2007 data.*

MOVING FORWARD

The South Carolina Department of Commerce appreciates the opportunity to provide this base analysis of Saluda County's labor market. We hope that it will help in advancing the progress of Saluda County's economic development.

What's been done so far?

This analysis identifies the region's assets—both current and future—at a macro level. Labor Market Information (LMI) at the S.C. Department of Commerce developed a Base Labor Analysis report providing an overview of the region's population, industries, occupations, and educational assets. Additionally, these findings were benchmarked against the state and the nation.

What's next?

Because local knowledge is required to interpret and apply the findings appropriately, the Saluda Base Labor Analysis should be used with local stakeholders to identify and define key, targeted industry clusters. Some items to consider when defining these clusters may include the following.

1. *What is Saluda's economic base?*

In order for an economy to grow, it must have a base (export) sector that generates wealth from beyond its borders. Industries in the economic base (manufacturing, scientific and technology services, warehouse and distribution, financial services, regional healthcare, etc.) typically provide occupations with higher pay and benefits as well as better human capital development and promotion opportunities. A successful economic base stimulates the development of the non-base sector (housing, schools, retail, restaurants, personal services, etc.). It also propels the local tax base which, in turn, provides support to community services.

2. *What are strategies to assist low-wage citizens in non-base economy jobs?*

Although the economic base is the driver for long-term growth in a region, implementable strategies for developing job opportunities for low-skilled individuals is a priority for community economic well-being. This need must also be kept in mind when defining target industry clusters.

3. *What other factors are vital to Saluda and its community?*

Over and above pure economic considerations, what is important to the citizens of the Saluda community? How does Saluda want to be perceived? What quality of life issues affect Saluda? These questions may impact the types of industries desired for the area.

How Labor Market Information at the S.C. Department of Commerce can help.

Once local stakeholders have identified key industry clusters vital to the future economic development of the region, LMI can provide more in-depth analysis of each of these industries, their occupations, business establishments, and educational requirements.

1. Detailed Industry Analysis

For each identified industry, LMI can develop a detailed analysis of each sector, including employment, projected growth, staffing patterns, location quotients, and employers. Additionally, the analysis will examine the largest, fastest growing, and declining sectors within the industry cluster.

2. Detailed Occupational Analysis

At this point, the occupations—classified by SOC codes—that make up each of the identified industry clusters can be analyzed in detail. This analysis will include employment, average earnings, educational requirements, projected growth, and completers from available local training programs. It will culminate in identifying gaps between the number of occupations required to sustain and advance industry growth and the number of skilled workers (as identified by educational requirements and program completers) available to fulfill these positions.

3. Identification of Implementable Recommendations

LMI will utilize the findings of the analyses to develop a set of implementable recommendations. These may include recommendations to align community college programs with economic development goals along with others. Finally, local knowledge will once again be called upon to review the findings and develop an action plan for the implementation of feasible solutions.

Appendix A: Occupational Projections for Saluda County

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
11-3031	Financial managers	15	19	4	27	0.65	18.80	Degree plus work experience
11-3051	Industrial production managers	15	18	3	20	2.83	22.13	Work experience in a related field
11-9011	Farm, ranch, and other agricultural managers	192	218	26	14	10.69	11.71	Degree plus work experience
11-9012	Farmers and ranchers	583	588	5	1	9.75	6.55	Long-term on-the-job training
11-9021	Construction managers	25	30	5	20	0.96	11.92	Bachelor's degree
11-9032	Education administrators, elementary and secondary school	13	15	2	15	1.25	36.41	Degree plus work experience
11-9051	Food service managers	12	17	5	42	0.78	8.10	Work experience in a related field
11-9141	Property, real estate, and community association managers	11	17	6	55	0.27	7.78	Bachelor's degree
11-9199	Managers, all other	24	28	4	17	0.42	8.04	Work experience in a related field
11-1011	Chief executives	30	34	4	13	0.77	24.48	Degree plus work experience
11-1021	General and operations managers	56	60	4	7	0.90	25.35	Degree plus work experience

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
13-1111	Management analysts	11	15	4	36	0.31	16.17	Degree plus work experience
13-2011	Accountants and auditors	35	41	6	17	0.64	12.40	Bachelor's degree
13-2072	Loan officers	28	34	6	21	2.12	16.31	Bachelor's degree
21-1012	Educational, vocational, and school counselors	12	13	1	8	1.30	16.85	Master's degree
25-1099	Postsecondary teachers	24	28	4	17	0.42	37.13	Doctoral degree
25-2021	Elementary school teachers, except special education	92	107	15	16	1.60	22.57	Bachelor's degree
25-2022	Middle school teachers, except special and vocational education	29	33	4	14	1.17	20.68	Bachelor's degree
25-2031	Secondary school teachers, except special and vocational education	56	61	5	9	1.46	23.47	Bachelor's degree
25-3099	Teachers and instructors, all other	29	32	3	10	1.28	14.22	Bachelor's degree
25-9041	Teacher assistants	51	54	3	6	1.04	9.10	Short-term on-the-job training
29-1069	Physicians and surgeons	13	11	-2	-15	0.45	49.25	First professional degree
29-1111	Registered nurses	41	43	2	5	0.47	16.46	Associate's degree
29-2061	Licensed practical and licensed vocational nurses	15	15	0	0	0.60	10.98	Postsecondary vocational award
31-1011	Home health aides	27	27	0	0	0.82	6.55	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
31-1012	Nursing aides, orderlies, and attendants	23	25	2	9	0.44	6.55	Postsecondary vocational award
33-3012	Correctional officers and jailers	14	17	3	21	1.00	11.62	Moderate-term on-the-job training
33-3051	Police and sheriff's patrol officers	31	34	3	10	1.49	14.90	Long-term on-the-job training
33-9032	Security guards	11	12	1	9	0.29	10.63	Short-term on-the-job training
35-2012	Cooks, institution and cafeteria	16	16	0	0	1.11	8.87	Moderate-term on-the-job training
35-2021	Food preparation workers	24	27	3	13	0.76	7.99	Short-term on-the-job training
35-3021	Combined food preparation and serving workers, including fast food	17	15	-2	-12	0.19	8.49	Short-term on-the-job training
35-3031	Waiters and waitresses	15	11	-4	-27	0.18	6.55	Short-term on-the-job training
37-1011	First-line supervisors/managers of housekeeping and janitorial workers	12	13	1	8	0.91	10.86	Work experience in a related field
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	70	84	14	20	0.87	8.90	Short-term on-the-job training
37-2012	Maids and housekeeping cleaners	85	90	5	6	1.14	6.55	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
37-2019	Building cleaning workers, all other	15	17	2	13	0.85	6.58	Short-term on-the-job training
37-3011	Landscaping and groundskeeping workers	23	28	5	22	0.62	9.53	Short-term on-the-job training
39-2011	Animal trainers	21	23	2	10	6.14	6.94	Moderate-term on-the-job training
39-2021	Nonfarm animal caretakers	27	30	3	11	2.03	7.23	Short-term on-the-job training
39-9011	Child care workers	72	72	0	0	1.12	6.55	Short-term on-the-job training
39-9021	Personal and home care aides	24	26	2	8	0.74	6.55	Short-term on-the-job training
41-1011	First-line supervisors/managers of retail sales workers	63	71	8	13	0.79	9.88	Work experience in a related field
41-1012	First-line supervisors/managers of non-retail sales workers	17	20	3	18	0.52	12.30	Work experience in a related field
41-2011	Cashiers, except gaming	110	111	1	1	0.87	6.57	Short-term on-the-job training
41-2031	Retail salespersons	65	78	13	20	0.37	8.84	Short-term on-the-job training
41-3021	Insurance sales agents	12	10	-2	-17	0.47	7.05	Bachelor's degree

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	29	37	8	28	0.50	15.25	Moderate-term on-the-job training
41-9021	Real estate brokers	18	27	9	50	0.29	6.99	Work experience in a related field
41-9022	Real estate sales agents	19	29	10	53	0.29	6.91	Postsecondary vocational award
41-9091	Door-to-door sales workers, news and street vendors, and related workers	27	18	-9	-33	0.67	6.56	Short-term on-the-job training
43-1011	First-line supervisors/managers of office and administrative support workers	51	53	2	4	0.94	12.47	Work experience in a related field
43-3011	Bill and account collectors	12	15	3	25	0.82	8.72	Short-term on-the-job training
43-3021	Billing and posting clerks and machine operators	16	16	0	0	0.87	8.45	Moderate-term on-the-job training
43-3031	Bookkeeping, accounting, and auditing clerks	68	76	8	12	0.86	8.60	Moderate-term on-the-job training
43-4051	Customer service representatives	34	45	11	32	0.43	8.79	Moderate-term on-the-job training
43-4131	Loan interviewers and clerks	12	14	2	17	1.33	9.45	Short-term on-the-job training
43-4161	Human resources assistants, except payroll and timekeeping	12	14	2	17	2.04	10.53	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
43-4171	Receptionists and information clerks	21	24	3	14	0.53	8.20	Short-term on-the-job training
43-5052	Postal service mail carriers	12	13	1	8	1.05	16.30	Short-term on-the-job training
43-5071	Shipping, receiving, and traffic clerks	24	28	4	17	0.90	8.45	Short-term on-the-job training
43-5081	Stock clerks and order fillers	35	37	2	6	0.55	7.76	Short-term on-the-job training
43-5111	Weighers, measurers, checkers, and samplers, recordkeeping	12	12	0	0	4.47	7.66	Short-term on-the-job training
43-6011	Executive secretaries and administrative assistants	28	31	3	11	0.47	10.56	Moderate-term on-the-job training
43-6014	Secretaries, except legal, medical, and executive	47	47	0	0	0.64	8.87	Moderate-term on-the-job training
43-9061	Office clerks, general	88	99	11	13	0.80	8.60	Short-term on-the-job training
45-1099	Supervisors, farming, fishing, and forestry workers	16	17	1	6	7.22	12.83	Work experience in a related field
45-2041	Graders and sorters, agricultural products	24	27	3	13	12.30	7.45	Work experience in a related field
45-2091	Agricultural equipment operators	22	26	4	18	8.91	6.66	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
45-2092	Farmworkers and laborers, crop, nursery, and greenhouse	213	260	47	22	8.81	6.55	Short-term on-the-job training
45-2093	Farmworkers, farm and ranch animals	36	44	8	22	10.51	8.13	Short-term on-the-job training
45-4021	Fallers	30	16	-14	-47	39.09	9.95	Moderate-term on-the-job training
45-4022	Logging equipment operators	28	18	-10	-36	18.71	12.67	Moderate-term on-the-job training
47-1011	First-line supervisors/managers of construction trades and extraction workers	36	42	6	17	0.95	11.85	Work experience in a related field
47-2031	Carpenters	52	61	9	17	0.86	8.37	Long-term on-the-job training
47-2061	Construction laborers	33	38	5	15	0.63	7.53	Moderate-term on-the-job training
47-2073	Operating engineers and other construction equipment operators	16	19	3	19	1.04	10.40	Moderate-term on-the-job training
47-2111	Electricians	22	23	1	5	0.84	13.63	Long-term on-the-job training
47-2141	Painters, construction and maintenance	11	13	2	18	0.55	9.29	Moderate-term on-the-job training
47-2152	Plumbers, pipefitters, and steamfitters	19	24	5	26	1.10	12.68	Long-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	30	35	5	17	1.87	15.60	Work experience in a related field
49-3023	Automotive service technicians and mechanics	20	19	-1	-5	0.69	11.36	Postsecondary vocational award
49-3031	Bus and truck mechanics and diesel engine specialists	11	11	0	0	1.10	13.02	Postsecondary vocational award
49-9021	Heating, air conditioning, and refrigeration mechanics and installers	11	14	3	27	0.94	11.13	Long-term on-the-job training
49-9041	Industrial machinery mechanics	39	52	13	33	4.09	10.96	Long-term on-the-job training
49-9042	Maintenance and repair workers, general	114	133	19	17	2.32	11.17	Moderate-term on-the-job training
49-9043	Maintenance workers, machinery	13	15	2	15	4.50	8.78	Short-term on-the-job training
51-1011	First-line supervisors/managers of production and operating workers	88	103	15	17	3.59	15.05	Work experience in a related field
51-2092	Team assemblers	50	61	11	22	1.24	9.02	Moderate-term on-the-job training
51-3021	Butchers and meat cutters	30	35	5	17	6.56	12.26	Long-term on-the-job training
51-3022	Meat, poultry, and fish cutters and trimmers	162	191	29	18	32.00	10.18	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
51-3023	Slaughterers and meat packers	247	289	42	17	64.49	8.75	Moderate-term on-the-job training
51-3092	Food batchmakers	29	38	9	31	8.40	8.61	Short-term on-the-job training
51-3093	Food cooking machine operators and tenders	20	22	2	10	13.60	10.87	Short-term on-the-job training
51-8031	Water and liquid waste treatment plant and system operators	11	12	1	9	2.77	10.26	Long-term on-the-job training
51-9023	Mixing and blending machine setters, operators, and tenders	10	12	2	20	2.13	6.90	Moderate-term on-the-job training
51-9032	Cutting and slicing machine setters, operators, and tenders	41	48	7	17	14.74	8.10	Moderate-term on-the-job training
51-9041	Extruding, forming, pressing, and compacting machine setters, operators, and tenders	23	27	4	17	7.50	10.31	Moderate-term on-the-job training
51-9061	Inspectors, testers, sorters, samplers, and weighers	69	77	8	12	4.11	10.26	Moderate-term on-the-job training
51-9111	Packaging and filling machine operators and tenders	50	54	4	8	3.93	9.97	Short-term on-the-job training
51-9192	Cleaning, washing, and metal pickling equipment operators and tenders	15	16	1	7	21.52	10.85	Moderate-term on-the-job training
51-9193	Cooling and freezing equipment operators and tenders	11	11	0	0	18.62	11.86	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
51-9198	Helpers--Production workers	128	157	29	23	7.10	7.56	Short-term on-the-job training
51-9199	Production workers, all other	15	17	2	13	1.51	10.50	Moderate-term on-the-job training
53-3022	Bus drivers, school	23	25	2	9	1.36	6.71	Short-term on-the-job training
53-3031	Driver/sales workers	17	14	-3	-18	0.79	7.30	Short-term on-the-job training
53-3032	Truck drivers, heavy and tractor-trailer	84	88	4	5	1.25	12.68	Moderate-term on-the-job training
53-3033	Truck drivers, light or delivery services	36	37	1	3	0.88	8.80	Short-term on-the-job training
53-7051	Industrial truck and tractor operators	42	45	3	7	1.89	9.18	Short-term on-the-job training
53-7061	Cleaners of vehicles and equipment	55	58	3	5	4.44	6.57	Short-term on-the-job training
53-7062	Laborers and freight, stock, and material movers, hand	132	142	10	8	1.56	7.52	Short-term on-the-job training
53-7063	Machine feeders and offbearers	23	24	1	4	4.80	7.59	Short-term on-the-job training
53-7064	Packers and packagers, hand	57	56	-1	-2	2.04	6.95	Short-term on-the-job training
		6,173	6,862	688	11	10.62		

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
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Source: EMSI

at least 1.25 greater than \$10.62

Appendix B: Businesses by 3-Digit NAICS Codes

Saluda County								
Industry	NAICS Code	Change						
		2002	2007	Average Size	#	%	SC % change	US % change
Forestry and Logging	113	16	11	6	-5	-31.3	-26.0	-15.2
Support Activities for Agriculture and Forestry	115	7	8	0	1	14.3	-13.0	1.8
Construction of Buildings	236	15	11	5	-4	-26.7	-0.4	15.4
Heavy and Civil Engineering Construction	237	6	6	5	0	0.0	-2.0	-2.3
Specialty Trade Contractors	238	30	26	4	-4	-13.3	-6.4	12.9
Food Manufacturing	311	5	5	345	0	0.0	-13.3	-3.3
Merchant Wholesalers, Durable Goods	423	4	2	0	-2	-50.0	0.6	-5.6
Merchant Wholesalers, Nondurable Goods	424	6	4	3	-2	-33.3	-5.0	-3.5
Motor Vehicle and Parts Dealers	441	11	7	8	-4	-36.4	-11.6	2.2
Building Material and Garden Equipment and Supplies Dealers	444	5	4	3	-1	-20.0	-8.8	0.9
Food and Beverage Stores	445	13	7	17	-6	-46.2	-18.2	-0.5
Health and Personal Care Stores	446	5	2	0	-3	-60.0	9.1	10.2
Gasoline Stations	447	7	10	5	3	42.9	-2.8	-1.9
Clothing and Clothing Accessories Stores	448	3	2	0	-1	-33.3	-5.3	4.6
General Merchandise Stores	452	4	4	5	0	0.0	17.5	13.3
Miscellaneous Store Retailers	453	5	5	1	0	0.0	-23.9	-8.6
Truck Transportation	484	25	21	0	-4	-16.0	-5.1	5.4
Professional, Scientific, and Technical Services	541	11	13	4	2	18.2	2.1	14.3
Ambulatory Health Care Services	621	10	13	11	3	30.0	7.4	13.3
Social Assistance	624	8	4	0	-4	-50.0	-5.0	29.4
Food Services and Drinking Places	722	9	8	0	-1	-11.1	-0.2	12.2
Repair and Maintenance	811	17	11	2	-6	-35.3	-18.3	-0.4
Personal and Laundry Services	812	5	5	3	0	0.0	-2.4	7.2
Religious, Grantmaking, Civic, Professional, and Similar Organizations	813	3	1	0	-2	-66.7	-2.0	3.3
Private Households	814	7	9	0	2	28.6	4.6	24.9

growth rate exceeds both SC and US growth rates

Source: Bureau of Labor Statistics

Appendix C: Saluda County Employment by Industry Sector

		Employment		2002-2007 Change				2007 Average Annual Wage (\$)	Projected Growth
Industry	NAICS code	2002	2007	#	%	Location Quotient	Competitive Effect		
Total		4,764	4,379	-385	-8.1			26,591	11%

<i>6 star sectors</i>		Employment		2002-2007 Change				2007 Average Annual Wage (\$)	Projected Growth
Industry	NAICS code	2002	2007	#	%	Location Quotient	Competitive Effect		
NONE									

<i>5 star sectors</i>		Employment		2002-2007 Change				2007 Average Annual Wage (\$)	Projected Growth
Industry	NAICS code	2002	2007	#	%	Location Quotient	Competitive Effect		
Food Manufacturing	311	1,378	1,723	345	25	38.64	396	25,888	A
Professional, Scientific, and Technical Services	541	28	55	27	96	0.24	23	31,761	AA

<i>4 star sectors</i>		Employment		2002-2007 Change				2007 Average Annual Wage (\$)	Projected Growth
Industry	NAICS code	2002	2007	#	%	Location Quotient	Competitive Effect		
Merchant Wholesalers, Nondurable Goods	424	12	13	1	8	0.21	1	30,928	AA

3 star or fewer sectors		Employment		2002-2007 Change				2007 Average Annual Wage (\$)	Projected Growth
Industry	NAICS code	2002	2007	#	%	Location Quotient	Competitive Effect		
Gasoline Stations	447	43	50	7	16	1.92	9	14,938	BA
Forestry and Logging	113	83	71	-12	-14	35.83	-1	30,711	D
Construction of Buildings	236	45	50	5	11	0.94	-1	25,663	AA
Heavy and Civil Engineering Construction	237	30	30	0	0	1.01	-2	33,857	AA
Motor Vehicle and Parts Dealers	441	73	57	-16	-22	0.99	-17	28,533	A
Food and Beverage Stores	445	139	117	-22	-16	1.36	-21	16,478	A
Ambulatory Health Care Services	621	252	139	-113	-45	0.84	-158	27,748	AA
Specialty Trade Contractors	238	123	103	-20	-16	0.71	-38	25,736	AA
Building Material and Garden Equipment and Supplies Dealers	444	37	11	-26	-70	0.28	-30	19,322	A
General Merchandise Stores	452	28	20	-8	-29	0.22	-10	13,182	BA
Miscellaneous Store Retailers	453	10	5	-5	-50	0.19	-4	14,468	BA
Repair and Maintenance	811	38	24	-14	-37	0.64	-14	19,829	BA
Personal and Laundry Services	812	15	15	0	0	0.38	-1	11,806	BA

Methodology and Sourcing

Projected Growth Grading Scale:

AA=above average

A=average

BA=below average

D=decline

Sectors are rated on 6 factors: 2002-2007 employment growth, 2002-2007 employment growth rate, location quotient, competitive effect, average annual wage, and projected growth.

Stars are based on: 2002-2007 employment growth of 25 or more, 2002-2007 employment growth rate greater than 0 (since overall county job growth was negative), location quotient of at least 1.25, competitive effect greater than 0, average annual wage greater than \$26,591 (2007 average for all jobs in the county), and average or above average projected growth.

Location Quotient: percentage of employment in the sector in the county divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in the county; based on 2007 data.

Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in the county after accounting for overall US employment growth and growth/decline in the sector in the US.

Source: Bureau of Labor Statistics; projections based on data from EMSI and SC Department of Commerce.



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